**Issues Identification and Tracking Document Template**

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**Issues Identification and Tracking Document**

**<Project Name>**

**Company Name**

**Street Address**

**City, State Zip Code**

**Date**

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# Introduction

The Issue Identification and Tracking Document is an important tool for any project. This document is also commonly used during the post go-live phase of project/product implementation. Inevitably, all projects encounter issues which must be documented and, ultimately, resolved. More complex projects often result in a higher number of issues which can adversely impact the project if not managed carefully. The Issue Identification and Tracking Document allows the project manager and team to capture issues as they are identified. Additionally, it allows the team to effectively manage these issues by prioritizing them, assigning them to various team members/stakeholders for action, and seeing them through to resolution.

This Issues Identification and Tracking Document has been created by Smith’s Software’s Budget Formulation Database Project Team to proactively identify, document, manage, and resolve risks throughout the project’s lifecycle. This document will serve as a repository for recording, updating, and tracking issues to more easily communicate the identified issues and their statuses. The Issues Identification and Tracking Document will be updated weekly or as a status changes. It will also be communicated to all stakeholders in accordance with the Budget Formulation Database Project’s version control process (see Communications Management Plan).

# Explanation of Issues Identification and Tracking Document Contents

Formats and contents for the Issues Identification and Tracking Document may vary based on system requirements or organizational standards. Most Issues Identification and Tracking Documents consist of fundamental contents which may be applied across a wide range of projects or software/system types. This section will provide explanations for each section of the Issues Identification and Tracking Document.

Issue #: Each issue should be sequentially numbered for reference and tracking purposes.

Issue Description: This section should provide a description of each issue to include what the potential impact will be and what part of the project or system will be affected.

Issue Type: This section should identify the type of issue that has been identified. Common issue types are: technical issues, resource issues, process issues, or external issues—those which fall outside of the organization. This categorization aids in assigning an issue owner.

Identified By: This section should provide the name(s) of the person/people who identified the issue. This is helpful in the event more clarification is needed as the issue is assigned or moves toward resolution.

Date Identified: Listing the date the issue was identified aids in tracking the issue and determining the amount of time the issue is taking to get resolved.

Issue Assigned To: This section should list the name of the person responsible for resolving the issue. This person may or may not be the individual to implement a solution. However, this person is responsible for ensuring the issue gets resolved.

Targeted Resolution Date: This is the target deadline for resolving the identified issue.

Priority: Each issue should be assigned a priority. This helps the team focus resources on the highest impact issues when there are cost, time, or resource constraints.

Status: Each issue’s status should be updated throughout the resolution process. As this is a living document, each issue’s status should be updated as any changes occur.

Date Resolved: This section should list the date the issue is resolved.

Resolution Description: This section should describe what was done to resolve the identified issue. This is important as lessons learned are archived for system deployments, projects, or go-live implementations. Future projects may encounter similar issues in which case the project teams can identify resolutions that were implemented in the past.

# Sample Issues Identification and Tracking Document

A sample Issues Identification and Tracking Document can be seen on the following page.

|  |  |
| --- | --- |
| Budget Formulation Database Project |  |
| Created By: J. Doe | Last Update By: J. Doe |  |
| Date Created: 3/15/xx | Last Revision Date: 4/1/xx |
| Issue # | Issue Description | Issue Type (Technical, Resource, Process, External) | Identified By | Date Identified | Issue Assigned To | Targeted Resolution Date | Priority (High, Medium, Low) | Status | Date Resolved | Resolution Description |
| 1 | Some users are receiving “access denied” message when trying to access database | Technical | A. White | 3/17/xx | P. Gray | 4/20/xx | High | A coding error was identified on 3/31/xx and reported to programming specialist for correction |  |  |
| 2 | Database home screen needs to be reformatted to include Smith’s software logo | Technical | B. Brown | 3/20/xx | J. Doe | 3/25/xx | Low | Requirement communicated to programming specialist for correction | 3/24/xx | Programming specialist made coding changes to software to include logo on home screen. |
| 3 | Budget team is not receiving timely input on budget numbers for database | Process | C. Black | 3/25/xx | L. Green | 4/25/xx | High | Investigation confirmed that the input process has various gaps resulting in delays and errors in budget inputs |  |  |
| 4 | Additional member of budget team needed to manage out year budget projections for contract support | Resource | D. Davis | 3/28/xx | G. Goodwin | 6/1/xx | Medium | Senior management is currently reviewing justification for additional staffing needs |  |  |

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